

GEORGIA DEPARTMENT OF HUMAN RESOURCES

Division/Office: Office of Technology & Support

Section/Unit: Construction & Real Property Section
Leasing Unit

Schedule No.: 82-378 **Admin. Chg. Date:** 10-15-97

Schedule Use: State Wide

Record Series Title: LEASE/RENTAL SPACE (STATE-WIDE) FILES

Description: Documents relating to maintaining lease and rental agreements on all leased space for the Department.

Included are: Forms 5028 (Request for Space) shows request information (Division, contract, address, phone); type of request (new, renewal, relocation, expanding same location); space desired (State-owned, rented, no preference); whether request for new or renewal space; whether request for office, warehouse, special space; reason for request; remarks; certification that space requested is necessary for the proper function of the office named and sufficient funds are available; signature of contract coordinator and title; 5026 (Rental Agreement) an agreement between the State of Georgia and the Landlord which shows pertinent information about the property to be rented, for what it is to be used, where located, etc., and applicable provisions, terms, conditions; and witnessed signatures as required; and unnumbered form for recording progress of each transaction.

File Arrangement: By DHR Division; thereunder, alphabetically by city in which leased property is located.

Retention/Disposition Instructions:

Cut off file as follows:

- (1) DHR Office of Technology & Support
DHR Divisions
(Reference Copies)

Upon expiration of the lease, place all papers for the particular agreement in the inactive file; cut off the inactive file at the end of each fiscal year; hold 1 year; then destroy.

(Continued on Next Page)

M97-253

970922-03

(2) DOAS (State Copy)

Retention requirement stated in approved schedule #76-25.

(3) DHR Office of Financial Services
(DHR record copy)

Cut off file at the end of each fiscal year; hold in current files area 1 year, or until State audit is completed; transfer to State Records Center; hold 4 years; then destroy. (approved schedule #78-185)

Confidential:

No-Open Record

Supersedes:

82-378 (approved 9-16-82)

M97-253
(82-378.OSS)

970922-03

**RECORDS RETENTION SCHEDULE NOTIFICATION
(ADMINISTRATIVE CHANGE OR DELETION)**

TO: DEPARTMENT OF ARCHIVES AND HISTORY - SCHEDULING M 97-253
AND
FOLLOWING DHR RECORDS COORDINATORS AND ALTERNATES

RECORDS COORDINATOR	RECORDS ALTERNATE	DIVISION OR OFFICE

☐ ALL DHR DIVISION / OFFICE RECORDS COORDINATORS AND ALTERNATES

FROM DHR POLICY ADMINISTRATION/RECORDS MANAGEMENT UNIT

SCHEDULE NO. SEE BELOW *	NOTIFICATION DATE
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SERIES TITLE
VARIOUS - SEE SAMPLE SCHEDULES ATTACHED.

APPROVED DATE	ADMINISTRATIVE CHANGE DATE (IF APPLICABLE)
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☒ ADMINISTRATIVE CHANGE-SEE ATTACHED COPY (COPIES) OF CHANGED SCHEDULES. AREAS OF CHANGE ARE HIGHLIGHTED ON ATTACHMENT(S).

☐ IGNORE ANY OTHER SCHEDULES THAT MAY BE SHOWN ON THE ABOVE ATTACHMENTS.

☐ SCHEDULE DELETION

☐ SEE ATTACHED COPY OF "RECORDS MANAGEMENT SERVICES REQUEST"

OR

☐ SEE DELETION EXPLANATION BELOW:

SWC *12/2/97* *12/2/97* *12/2/97*
~~00-001, 00-002, 00-003, 00-004, 00-080, 70-110, 73-499, 73-500, 73-501, 75-115, 78-016, 78-0299-A, 78-301~~
 78-302, 78-303, 82-378, 84-095, 84-099, 89-060, 89-061, 94-0022 AND 94-0023.

DHR RECORDS MANAGEMENT OFFICER APPROVAL <i>Gerald Poy</i>	DATE: 9-10-97
DEPT. OF ARCHIVES AND HISTORY APPROVAL <i>Peter Eschmider</i>	DATE: 12-2-97

APPLICATION FOR RECORDS RETENTION SCHEDULE

GEORGIA DEPARTMENT OF HUMAN RESOURCES
OFFICE OF ADMINISTRATIVE SERVICES
RECORDS MANAGEMENT UNIT

For instructions on completing this form contact DHR Records Management Unit, 47 Trinity Avenue, Atlanta, Georgia 30334. Phone - (404) 656-4976 GIST: 221-4983

DHR Application Date August 17, 1982 Application Number DHR 82-25		1. GEORGIA DEPARTMENT OF HUMAN RESOURCES Division of Administration Office of General Administration Room 509-S--47 Trinity Avenue, S.W. Atlanta, Georgia 30334		ARCHIVES AND HISTORY Application Number 82-378 Date Received AUG 25 1982 Date Completed SEP 16 1982	
2. Person to Contact Virginia Walsingham		Working Title Administrative Assistant		Telephone Number 656-4305	
3. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void					
4. Dates of Series Earliest 1977 Latest continuing		5. Records Series Title (followed by title used in office; if different) Lease/ Rental Space (State-wide) Files			
6. Division and Office Function What is the function of the Division and the Office in which this record series is created? <p>The Office of General Administration is responsible for providing administrative support to the Department. This includes: General Support Services; Insurance and Bonding; Management Information Systems; Contracts Management; all space management for the Department; management for all institutional repair and maintenance projects; preparing and processing lease and rental agreements on all leased space; coordinating the work for preparation and installation of all DHR telecommunications requests; managing the GIST account; and for invoice processing.</p>					
7. Records Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. <p>Documents relating to: maintaining lease and rental agreements on all leased space for the Department.</p> <p>Included are: forms - 5028 (Request for Space) shows request information (Division, contract, address, phone); type of request (new, renewal, relocation, expanding same location); space desired (State-owned, rented, no preference); whether request for new or renewal space; whether request for office, warehouse, special space; reason for request; remarks; certification that space requested is necessary for the proper function of the office named and sufficient funds are available; signature of contract coordinator and title; 5026 (Rental Agreement) an agreement between the State of Georgia and the Landlord which shows pertinent information about the property to be rented, for what it is to be used, where located, etc., and applicable provisions, terms, conditions; and witnessed signatures as required; and unnumbered form for recording progress of each transaction.</p> <p>File is arranged: by DHR / Division; thereunder, alphabetically by city in which leased property is located.</p>					
8. Monthly Reference Rate How often are records referred to which are: One to six months old _____ ; Seven to twelve months old _____ ; Thirteen to twenty-four months old _____ ; twenty-five months and older _____ ? frequent reference while lease is in effect.					
9. Annual Rate of Accumulation or Records approx. 4 Letter-size drawers _____ ; Legal-size drawers _____ ; Shelves _____ ; Other (Specify) _____					

YES	NO	10. Questionnaire (Place an "X" in the proper column)
	X	a. Is this the official copy of the series? If not, where is it? Georgia Department of Administrative Services
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	X	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
X		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where? DHR Office of General Administration
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|-----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | * e. Administrative need | <u>6</u> years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

* Ga. Dept. of Administrative Services
Schedule 76-25 - State Agency Lease
Lease Contract Files (record copy)

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☒ Fiscal Year; ☐ Other _____ then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☐ Destroy
- ☐ Transfer to State Archives for permanent retention.
- ☒ Other (Specify)

DOAS (State copy)

Retention requirement stated in
Approved Schedule 76-25.

Cut off file as follows:

DHR Office of General Administration
DHR Divisions
(reference copies)

DHR Office of Financial Services
(DHR record copy)

Upon expiration of the lease, place all papers for the particular agreement in the inactive file; cut off the inactive file at end of each fiscal year; hold 1 year; then destroy.

These instructions apply to all prior and future accumulations of the series.

Cut off file at end of each fiscal year; hold in current files area 1 year, or until State audit is completed; transfer to State Records Center; hold 4 years; then destroy.

(Approved Schedule 78-185)

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>James D. Smith</i>	8-19-82	<i>Elizabeth W. Crank</i>	8/17/82
		Elizabeth W. Crank, CRM-RMO State Records Committee (Signature)	Date
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Auditor/Designee	9-7-82
		Secretary of State/Designee	8/31/82
		Attorney General/Designee	8-13-82